CHARGE Anywhere® for iPhone®

DOWNLOAD

Enter App Store Store on iPhone or Computer

Search For: **CHARGE Anywhere**

To Install, Press: **"FREE"**

To Accept Permissions, Press: **"INSTALL"**

For Computer Download: iPhone needs to be synced to PC for App transfer to phone.

WELCOME SCREEN

Press: **Free App**

or

Press: **Upgrades**

FREE APP

CASH SALE

Press: **Transactions**

Press: **Cash**

Press: **Sale**

Enter Sale Amount: **0.00**

Press: **Actions**

Press: **Submit**

CHECK SALE

*Function only records as a cash transaction. Your check is not transmitted to bank.

Press: **Transactions**

Press: **Check**

Press: **Enter Check**

Enter check # :

Enter amount: **0.00**

Press: **Actions**

Press: **Submit**

UPGRADES & REGISTRATION

How to upgrade your App if you ALREADY HAVE a license key

1. **When App begins:**

   Press: **Upgrade**

   Press: **I have a License key**

   Follow Prompts

Or

2. **When App begins:**

   Press: **Upgrade**

   Unlock desired features

   Press: **Next**

   Agree to the Terms & Conditions

   Press: **Next**

   Follow Prompts

How to register your App if you DO NOT have a license key

1. **When App begins:**

   Press: **Upgrades**

   Press: **I do not have a License key**

   Follow Prompts

Or

2. **Within free version of App**

   Press: **Config**

   Press: **Upgrade App**

   Unlock desired features
   Follow Prompts

Or

3. **Within free version of App**

   Press: **Transactions**

   Press: **Credit, Gift Loyalty or eCheck**

   Press: **Upgrade**

   Follow Prompts

   Note: Processer informaton is required.

ENTERING PROCESSOR INFORMATION

Press: **Transactions**

Press: **Appropriate transaction type**

Follow Prompts

After upgrade & processer info is added.

REGISTRATION

Enter License #: **xxxx-xxxx-xxxx**

Phone #: **xxxxxxxxxx**

USER PROFILE

User Name: **Owner**

Password:

Confirm Password:

Clerk #:
 (Not required)

Press: **Save**

*Note: Initial user will have "OWNER" as user name.

*Note: Password Criteria
   Must be 8 characters. Must be both upper and lowercase letters. Must have both letters and Numbers.

USER LOGIN

User Name: **Owner**

Password:

Press: **Submit**

Enter App and begin running sales.

CHARGE Anywhere® for iPhone®

GET HARDWARE

Purchasing peripherals can be done within the App.

Press: **Config**

Press: **Feature Options**

Press: **Buy Hardware**

Choose the appropriate peripheral, then follow prompts

CONNECT PERIPHERALS FOR APPLICATION USE

Press: **Config**

Press: **Setup**

Press: **Peripheral Devices**

Press: **Device**

List of available peripherals will show. Press desired peripheral, then

Press: **Back**

Press: **Save**

ENABLING QUICKBOOKS® INTEGRATION

Press: **Config**

Press: **Setup**

Press: **Optional Prompts**

"QuickBooks Integration:" **ON**

Press: **Save**

Note: QuickBooks® Integration will now be enabled. Additional purchase may be required.

INDUSTRY-SPECIFIC OPTIONAL PROMPTS

[Depending on industry-specific setup options, these prompts may display during sale transactions]

Press: **Config**

Press: **Setup**

Press: **Optional Prompts**

Clerk # Text: **Naming Options:** *Clerk#, Driver#, Operator#, Employee#, Vendor#, Server Id, Bartender Id, Waiter Id*

Invoice # Text: **Naming Options:** *Invoice#, Ticket#, Job#, Order#*

Tax Prompt:

Tip Prompts:

Press: **Save**

.com UnitedBankService

RETAIL

Supports Apple iOS 3.1.3 and higher

AUTHORIZED DEALER

Powered by CHARGE ★ Anywhere®

QUICK SALE

From Main Menu

Swipe Card*

Enter Sale Amount

Press: Submit

[Phone connects to host for authorization]
See Receipt Printing & Signature Capture

RECEIPT PRINTING

Signature Receipt Automatically Prints if connected to Card Reader/Receipt Printer

CREDIT SALE

Press: Transactions

Press: Credit

Press: Sale

Swipe Card*

------------------ or ------------------

Enter Name:
Enter Card #:
Enter Exp Date:
Card Present: ON OFF
Enter Address:
Enter Zip Code:

Enter Sale Amount

Press: Actions

Press: Submit

[Phone connects to host for authorization]
See Receipt Printing & Signature Capture

ACH SALE

Press: Transactions

Press: ACH/eCheck

Press: Sale

Name:
Routing #:
Account #:
Type: Choose Desired Account
Recurring: ON OFF

Enter Sale Amount

Press: Actions

Press: Submit

CHECK CONVERSION

Press: Transactions

Press: ACH/eCheck

Press: Check Conversion

Name:
Check #:
Routing #:
Account #:
Type: Choose Desired Account

Enter Sale Amount

Press: Actions

Press: Submit

GIFT / LOYALTY SALE

Press: Transactions

Press: Gift/Loyalty

Press: Charge

Card #:

Enter Sale Amount

Press: Actions

Press: Submit

GIFT / LOYALTY REFUND

Press: Transactions

Press: Gift/Loyalty

Press: Refund

Card #:

Enter Sale Amount

Press: Actions

Press: Submit

SIGNATURE CAPTURE

Signature Capture Screen appears.

Customer places their signature on screen

Press: Submit

[Customer's Signature is saved with the transaction]

------------------ or ------------------

Press: Cancel

[Signature Capture is bypassed]

Note: Signature Capture is automatically enabled.

CHECK SALE

Function only records as a cash transaction. Your check is not transmitted to bank.

Press: Transactions

Press: Check

Press: Enter Check

Enter Check #:

Enter Check Amount: 0.00

Press: Actions

Press: Submit

AUTH ONLY

In order to run an Auth Only Transaction, device must be Online.

Press: Transactions

Press: Credit

Press: Auth. Only

Swipe Card

------------------ or ------------------

Enter Name:
Enter Card #:
Enter Exp Date:
Card Present: ON OFF
Enter Address:
Enter Zip Code:

Enter Authorization Amount

Press: Actions

Press: Submit

[Phone connects to host for authorization]

COMPLETING AUTH ONLY

Press: Logs

Press: Auth. Only Transactions

Select the transaction to be submitted.

Verify card info / transaction amount

Press: Actions

Press: Capture

Enter Sale Amount:

Press: OK

[Phone connects to host and response is displayed]

VOID

Press: Transactions

Press: Credit

Press: Void

Enter Transaction ID #:

Verify card info/transaction amount.

Press Menu key: Void Transaction

------------------ or ------------------

Press: Logs

Press: Current Day Log

Select transaction to void.

Verify card info/transaction amount.

Press: Actions

Press: Void

[Phone connects to host and response is displayed]

RETURN

Press: Transactions

Press: Credit

Press: Return

Swipe Card*

------------------ or ------------------

Enter Name:
Enter Card #:
Enter Exp Date:
Card Present: ON OFF

Enter Return Amount

Press: Actions

Press: Submit

[Phone connects to host and response is displayed]

FORCE

Press: Transactions

Press: Credit

Press: Force

Swipe Card and Enter Approval Code:

------------------ or ------------------

Enter Name:
Enter Card #:
Enter Exp Date:
Card Present: ON OFF
Approval Code:
Enter Address:
Enter Zip Code:

Enter Force Amount

Press: Actions

Press: Submit

[Phone connects to host for authorization]
See Receipt Printing

RETRY

Press: Logs

Press: Current Day Log

Select the desired transaction.

Press Menu key: Retry Transaction

[Phone connects to host for authorization]
See Receipt Printing & Signature Capture

ENABLING OFFLINE MODE

Press: Config

Press: Setup

Press: Transaction Settings

"Offline": ON

Press: Save

[Phone enters offline mode when "ON" button is clicked]

Note: Offline Warning will pop-up. Phone will not provide live authorizations

SALE IN OFFLINE MODE

Enable Offline as described above.

Press: Transactions

Press: Credit

Press: Sale

Swipe Card*

------------------ or ------------------

Enter Name:
Enter Card #:
Enter Exp Date:
Card Present: ON OFF
Enter Address:
Enter Zip Code:

Enter Sale Amount

Press: Actions

Press: Submit

Note: Phone will not provide live authorizations

VIEWING OFFLINE TRANSACTIONS

Press: Logs

Press: Offline Transactions

Scroll to the desired transaction.

Select the transaction.

[Details of the transaction will display]

DISABLING OFFLINE MODE

Press: Config

Press: Setup

Press: Transaction Settings

"Offline": OFF

Press: Save

[Phone leaves offline mode when "OFF" button is clicked]

Note: Phone enters online mode and will now provide live authorizations

SENDING AN OFFLINE TRANSACTION

*[Ensure the phone is **NOT** in offline mode]*
See: Disabling Offline Mode

Press: Logs

Press: Offline Transactions

Select the desired transaction.

Press: Actions

Press Menu key: Send

[Phone connects to host for authorization and prints a receipt]

SENDING ALL OFFLINE TRANSACTIONS

Press: Logs

Press: Offline Transactions

Press Menu key: Send All

[Phone sends transactions and processes receipts one at a time]

LOCATING CUSTOMER ID

Press: Config

Press: Support

Press: About

Locate Customer ID